

Department of Education

Student Financial Assistance

Customer Relationship Management/Call Center IPT

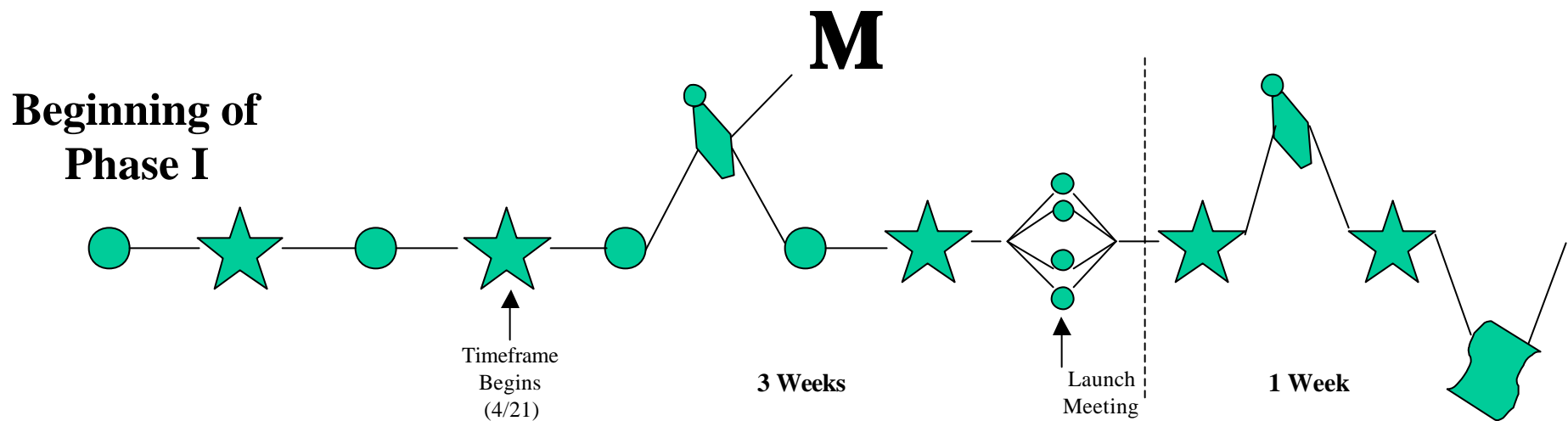


- DRAFT - Detail Process Road Map
- May 9, 2000

Phase I: Chartering Core Team**Timeframe:** 4 weeks (April 21 to May 19)

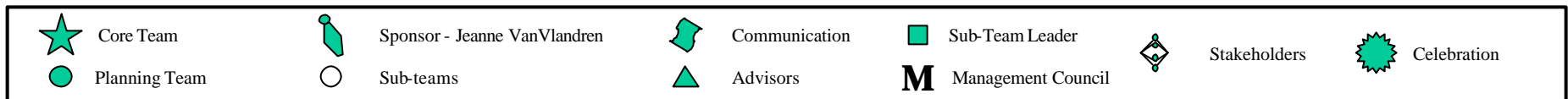
Deliverables:

- Launch meeting completed with stakeholders, advisors, and core team
- Understanding of and agreement on charter (including: team members/roles, goals, stakeholder analysis, process road map, workplan).



Assumptions:

- This timeframe begins with the 4/21 Core Team Meeting.
- 3 weeks to schedule/prepare for the Launch Meeting.
- 1 week to explain and gather support for the charter.



Phase I: Sub-Team Determination**Timeframe:** 1 week (May 19 to May 26)**Deliverables:**

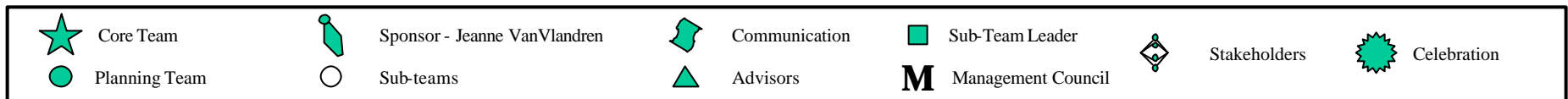
- Agreement on sub-team leaders, members, roles & responsibilities, goals, and expectations.



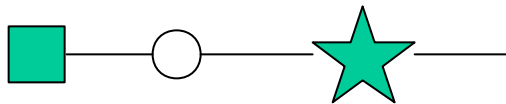
1 Week

Assumptions:

- 1 week to have one productive meeting to determine team leads, members, structure, etc...

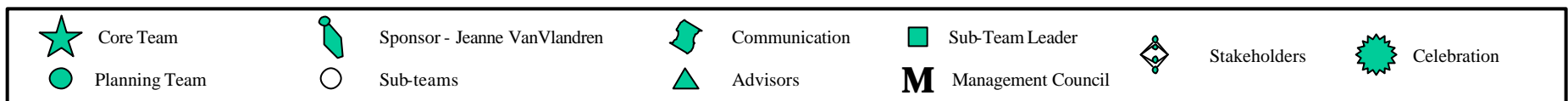


- Phase I:** **Team Assembly - *Current State***
- Timeframe:** **1 week (May 26 to June 2)**
- Deliverables:** • **Commitment of sub-team members to the task and responsibilities.**



1 Week

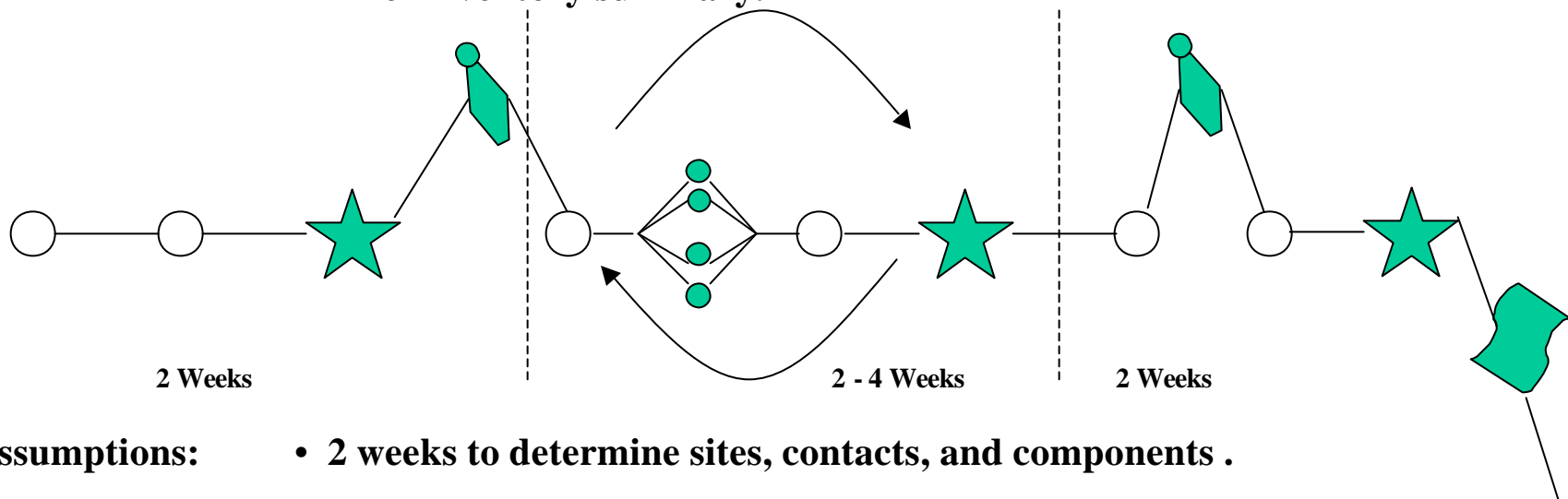
- Assumptions:**
- **1 week to gather the team after all members have been identified, go over roles and responsibilities, get individual team member commitments, and establish regular meetings.**
 - **Sub-team lead will report back to the Core Team.**



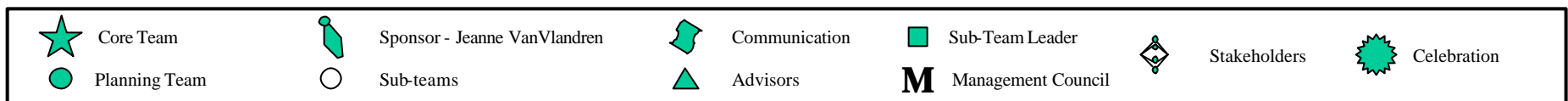
Phase I: Inventory Development - *Current State*

Timeframe: 6 - 8 weeks (June 2 to July 28)

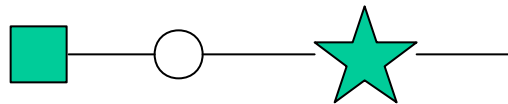
- Deliverables:**
- Agreement on SFA sites to inventory and contact person at each site.
 - Agreement on inventory components.
 - Inventory completed.
 - Brief inventory summary.



- Assumptions:**
- 2 weeks to determine sites, contacts, and components .
 - 2 - 4 weeks to complete inventories and conduct follow-up meetings.
 - 1 week to compile an inventory summary.
 - 1 week to circulate the inventory summary and gain agreement.

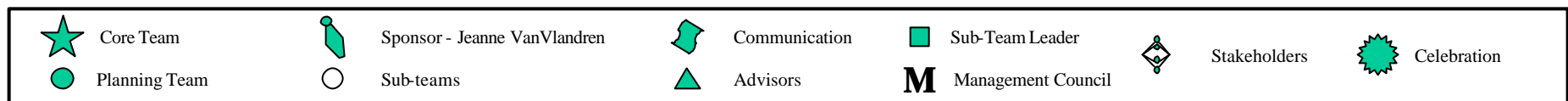


- Phase I:** **Team Assembly - “*Best-In-Business*”**
- Timeframe:** **1 week (May 26 to June 2)**
- Deliverables:** • **Commitment of sub-team members to the task and responsibilities.**



1 Week

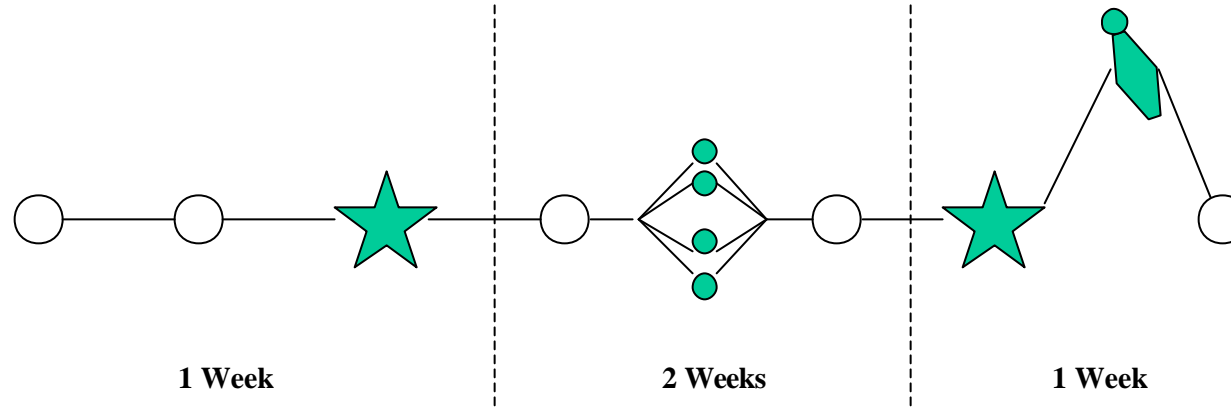
- Assumptions:**
- **1 week to gather the team after all members have been identified, go over roles and responsibilities, get individual team member commitments, and establish regular meetings.**
 - **Sub-team lead will report back to the Core Team.**



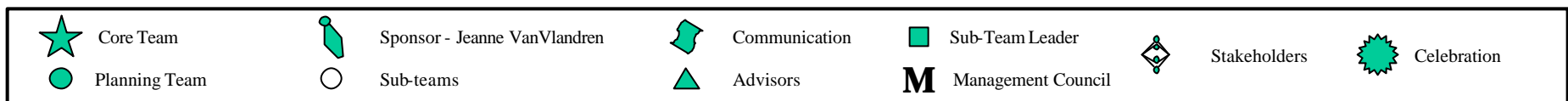
Phase I: Expert Identification & Enrollment - “Best-In-Business”

Timeframe: 4 weeks (June 2 to June 30)

- Deliverables:**
- Agreement on and enrollment of Best Practices experts.
 - Agreement with Best Practices data gathering plan (including: what to ask, of whom, how, and by when).



- Assumptions:**
- Research of Best Practices experts will begin prior to this phase.
 - 1 week to gain initial Core Team consensus for Best Practices experts.
 - 2 weeks to research/enroll BP experts and develop a Data Gathering Plan.
 - 1 week to gain final consensus from Core Team and Sponsor.

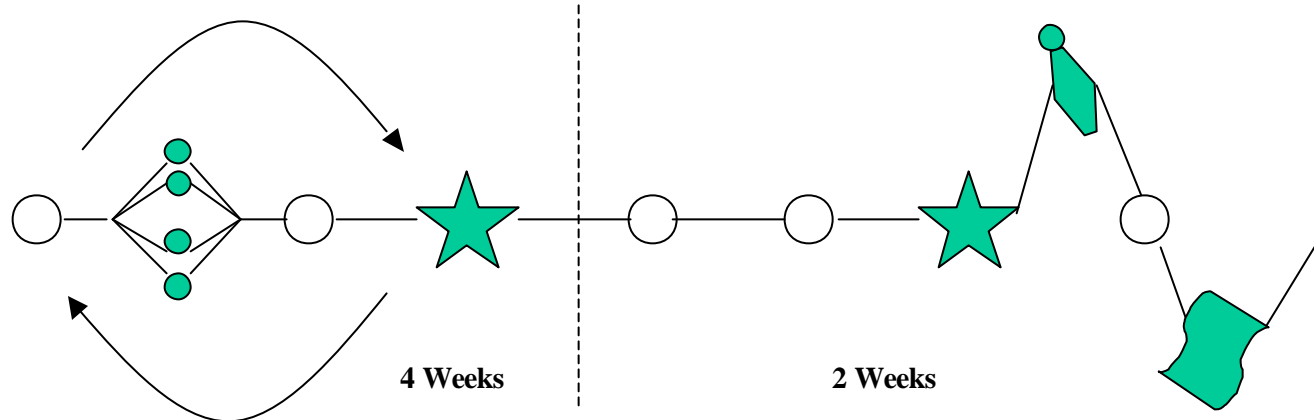


Phase I: **Best Practices Development - “Best-In-Business”**

Timeframe: **6 weeks (June 30 to August 11)**

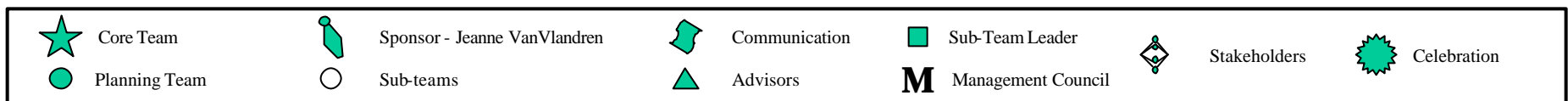
Deliverables:

- **Data gathering completed.**
- **Core Team understanding of Best Practices.**
- **Summary document of Best Practices.**



Assumptions:

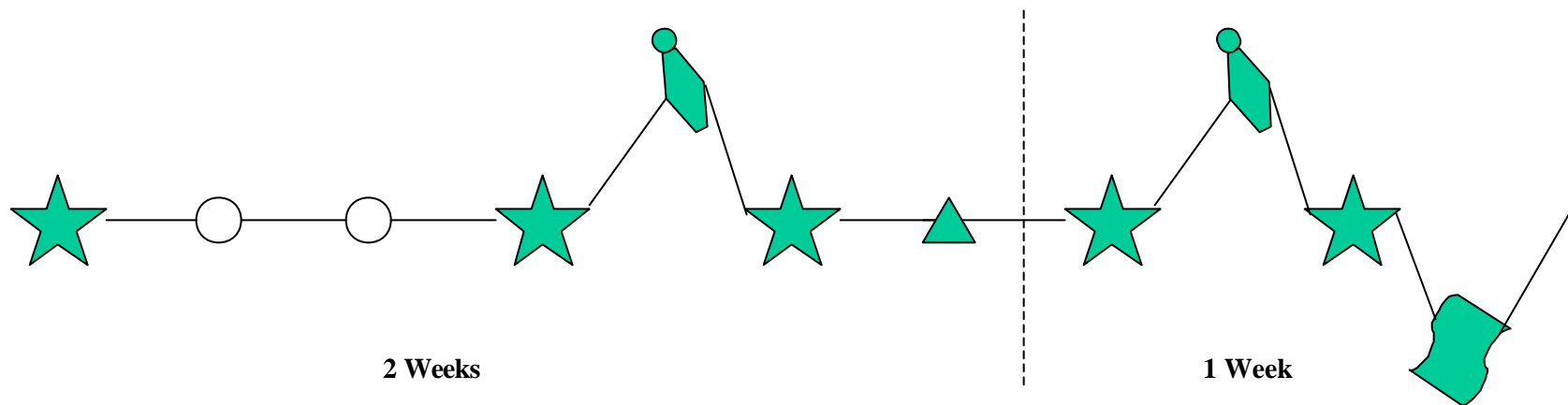
- **4 weeks for data gathering and follow-up meetings to compile Best Practices information.**
- **2 weeks to summarize the Best Practices identified and have documents reviewed.**



Phase I: **Gap Analysis**

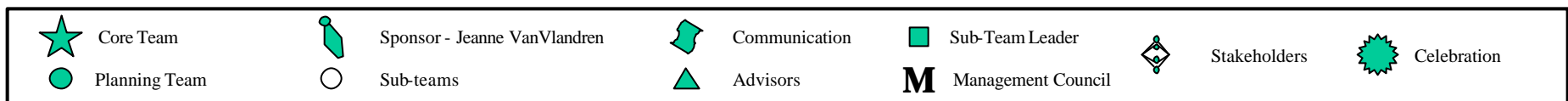
Timeframe: **3 weeks (August 11 to September 1)**

Deliverables: • **Gap Analysis**



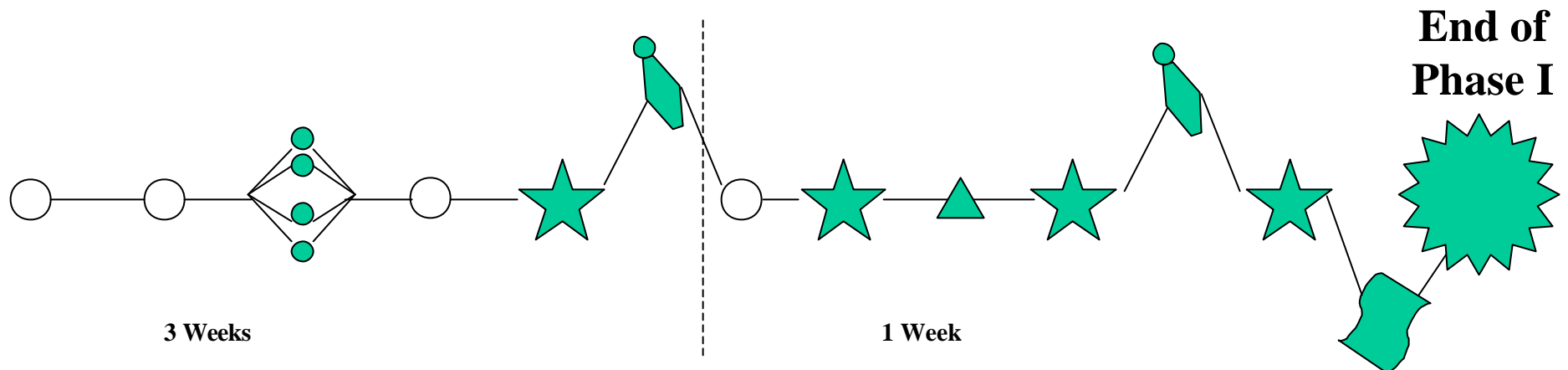
Assumptions:

- **2 weeks to analyze data between the current state and Best Practices identified to develop a Gap Analysis document and to meet with advisors.**
- **1 week to refine the Gap Analysis document.**

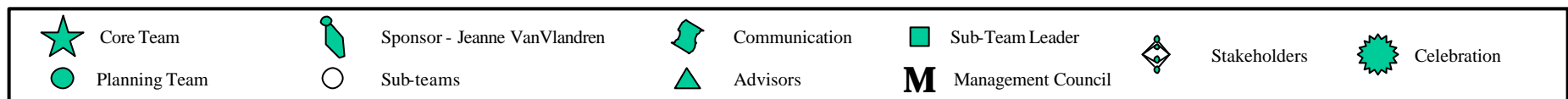


Phase I: Solution Generation/Recommendation**Timeframe:** 4 weeks (September 1 to September 29)

- Deliverables:**
- List of recommended solutions.
 - Business cases for agreed upon initial solutions.
 - Celebration.



- Assumptions:**
- 3 weeks to compile a list of recommended solutions and agreement on initial solutions to write business cases for (by September 29).
 - 1 week to write business cases for the agreed upon initial solutions (by September 29).
 - Celebration to mark the completion of Phase I.

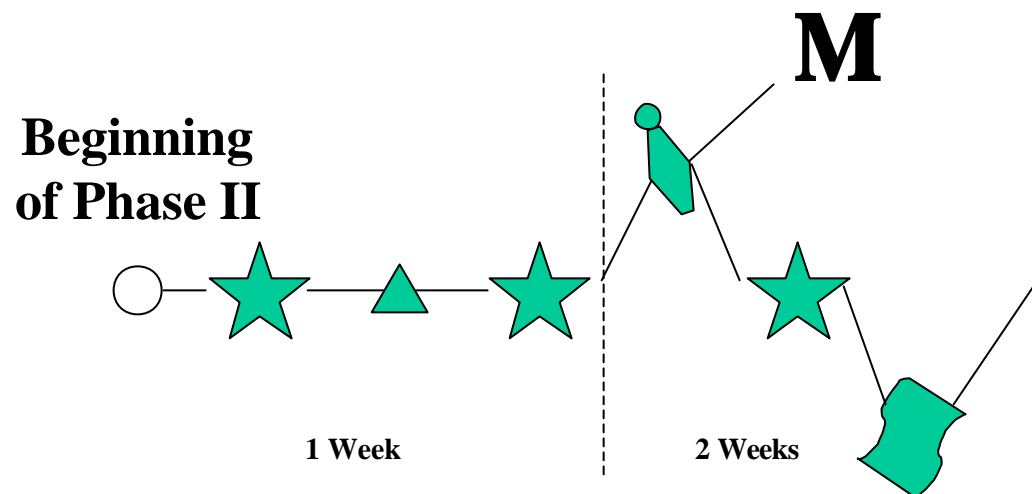


Phase II: Solution Selection/Approval

Timeframe: 3 weeks (September 29 to October 20)

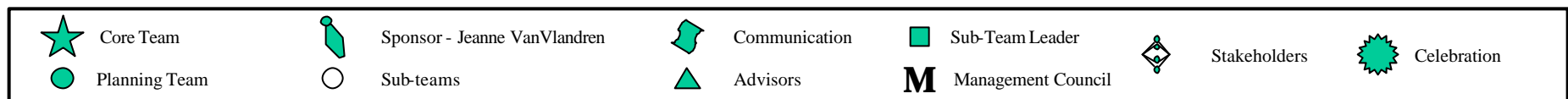
Deliverables:

- **Business case for additional solutions.**
- **Management Council agreement on solution to be implemented.**



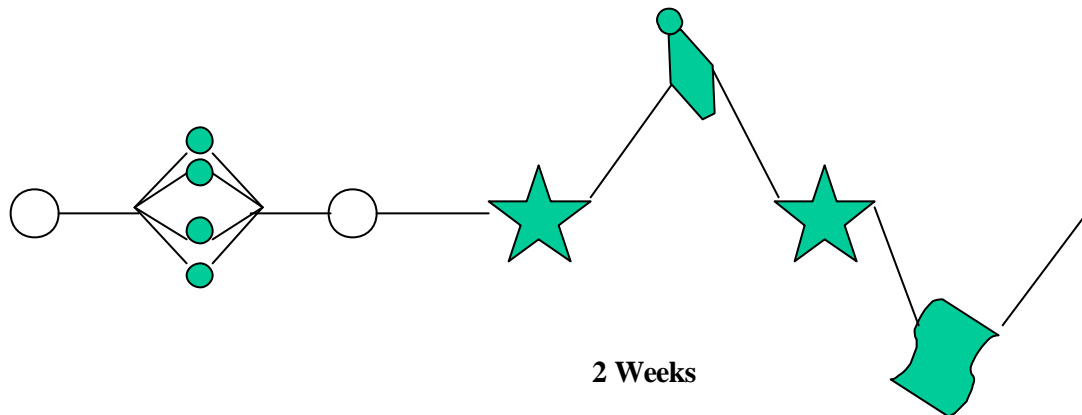
Assumptions:

- **1 week to write business cases for any additional solutions.**
- **2 weeks to gain Management Council consensus on the solutions to be implemented.**

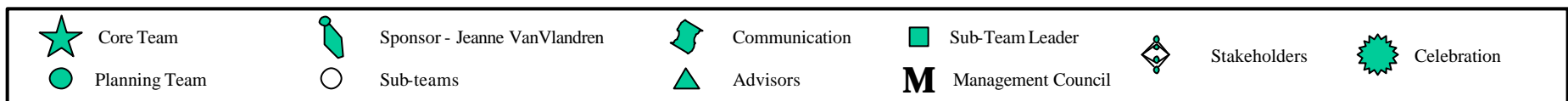


Phase II: Action Planning**Timeframe: 2 weeks (October 20 to November 3)**

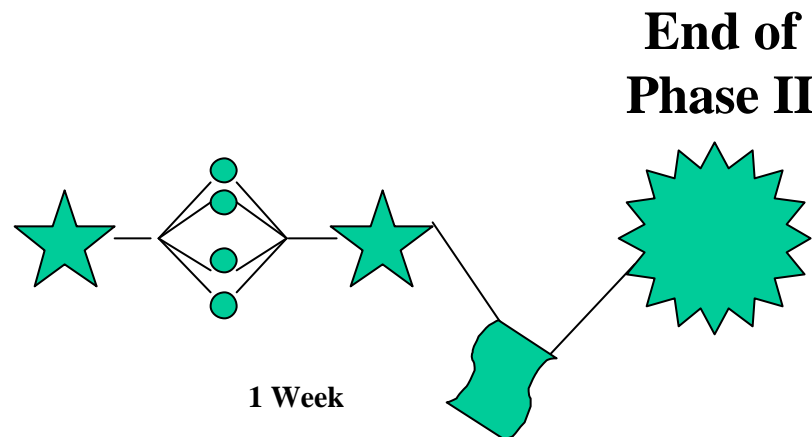
- Deliverables:**
- Action Plan for additional Quick Hits.
 - Action Plan for detailed design and implementation of agreed upon solution.



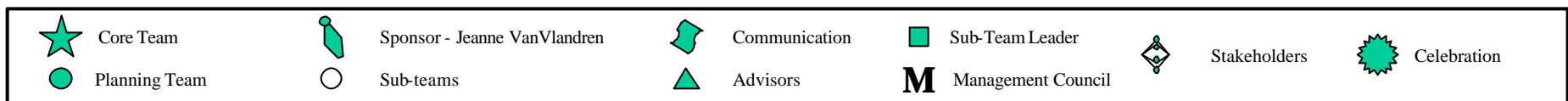
- Assumptions:**
- 2 weeks to develop an Action Plans.



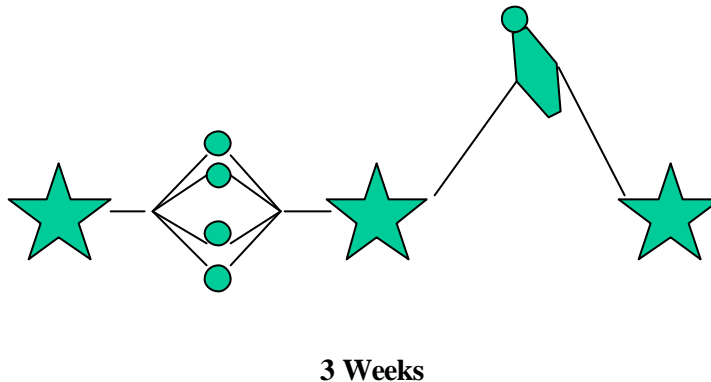
- Phase II:** **Evaluation of IPT Process**
- Timeframe:** **1 week (November 3 to November 10)**
- Deliverables:**
- **Lessons Learned Report.**
 - **Evaluation Plan for Quick Hits.**
 - **Celebration.**



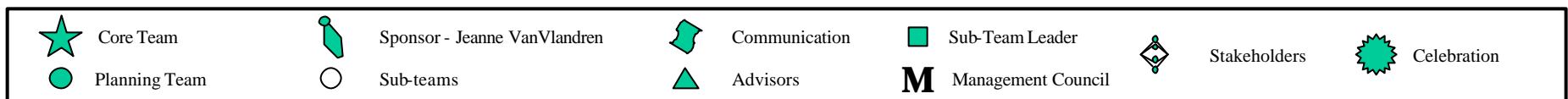
- Assumptions:**
- **1 week to compile a Lessons Learned Report evaluating the Customer Relationship Management/Call Center IPT and to develop an Evaluation Plan for implemented Quick Hits.**
 - **Celebration to mark the completion of Phase II and the Customer Relationship Management/Call Center IPT solution decision-making process.**



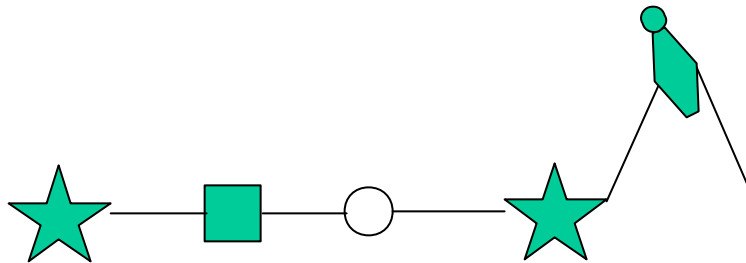
- Phase I:** Identification of Quick Hits - *Quick Hits*
- Timeframe:** 3 weeks (May 26 to June 16)
- Deliverables:**
- Agreement on prioritized list of Quick Hits.
 - High-level business case for agreed upon Quick Hits.



- Assumptions:**
- 2 weeks to achieve agreement with the Sponsor upon a list of Quick Hits.
 - 1 week to write a high-level business case for Quick Hits.

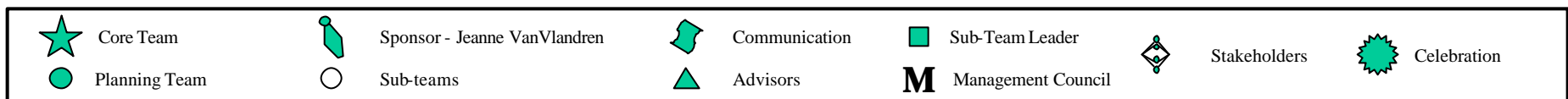


- Phase I:** **Team Assembly - *Quick Hits***
- Timeframe:** **1 week (June 16 to June 23)**
- Deliverables:** • **Team leaders and team members appointed and role clarification.**
- **Agreement on work plans and timelines.**



1 Week

- Assumptions:** • **1 week to gather the team, go over roles and responsibilities, and establish regular meetings and develop work plans and timelines.**

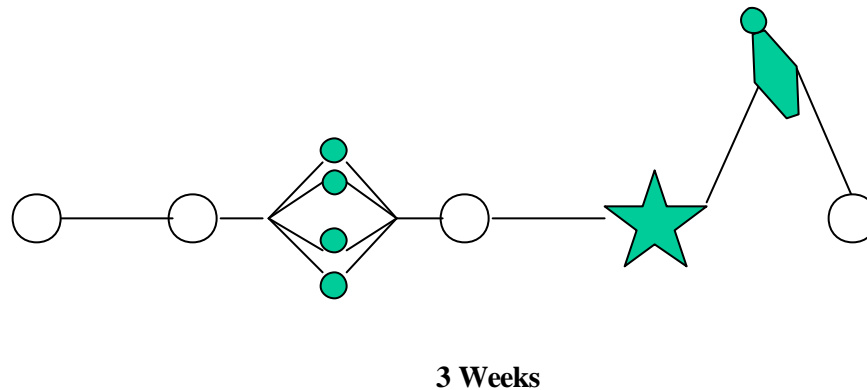


Phase I: **Solution Design - *Quick Hits***

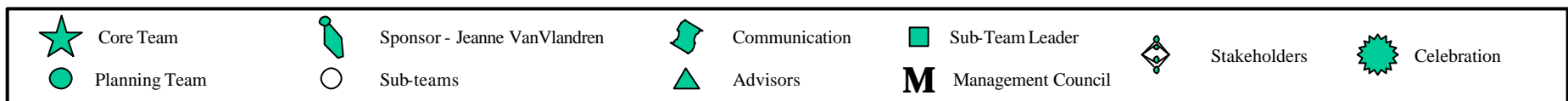
Timeframe: **3 weeks (June 23 to July 14)**

Deliverables:

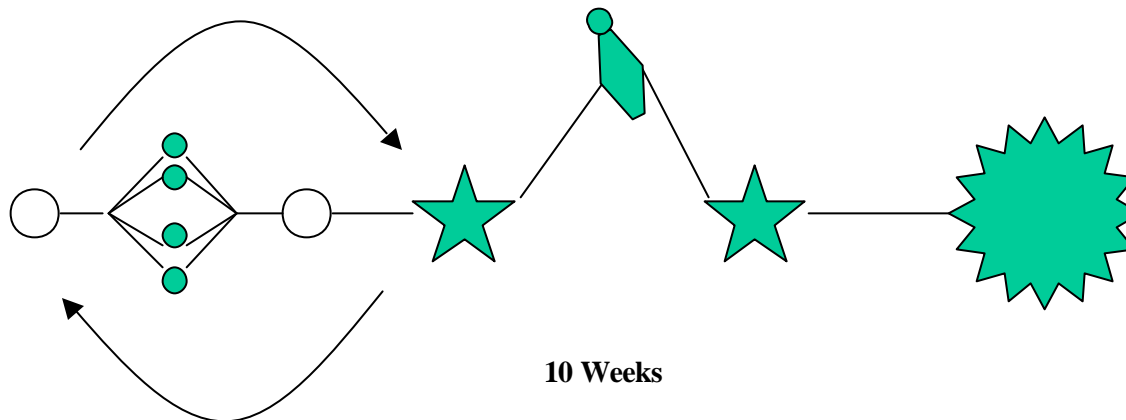
- **Agreement on target audience or target centers.**
- **Agreement on solutions to be implemented and relative impact for each Quick Hit.**



Assumptions: • **3 weeks to determine a design for each Quick Hit.**



- Phase I:** **Implementation - *Quick Hits***
- Timeframe:** **10 weeks (July 14 to September 22)**
- Deliverables:** • **Solution tested.**
- **Solution implemented.**



- Assumptions:** • **5 weeks to develop the Quick Hit solutions.**
- **5 weeks to test the Quick Hit solutions after implementation.**
- **Celebration to mark the completion of the Quick Hit process.**

